
THE REACTION OF THE TOURISM INDUSTRY TO THE CODE 19: WAYS OF ADAPTATION

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In modern society, the tourism sector is not a negative part of the economy and in many countries of the world acts as a catalyst for social economic development. Providing a tenth of the world's gross national product, tourism, despite the obstacles that arise (natural disasters, man-made disasters, terrorist acts), is fully recognized as one of the most profitable and dynamically developing sectors of the economy. The tourism industry is a strong base of jobs, a source of filling the state budget; develops all areas related to the creation of a tourism product; provides an increase in the general level of culture, which motivates the state to develop this service sector. At the same time, the tourism industry has certain features that must be taken into account when forming models and forecasts for the development of individual territories. For example, tourism has a multiplier effect on other spheres of economic activity: transport, agriculture, trade, catering and affects the social, cultural and ecological environment. However, the coronavirus pandemic, which has affected almost all countries and the global crisis caused by it, has dealt a significant blow to many sectors of the economy, including the tourism sector. The tourism industry found itself in uncertain working conditions, which entailed significant changes in the functioning of the subjects of tourism activity. The article analyzes the current state and identifies trends in the development of the global tourism market in the context of the COVID-19 pandemic, as well as systematizes the measures that are being taken by Ukraine and other countries to stimulate and support the tourism industry. The contribution of tourism to world GDP is analyzed for the countries most popular among tourists.

Keywords: *tourism, pandemic influence, development*

For a long time, the tourism and hospitality sector played a significant role as a significant catalyst for the recovery, revitalization and growth of both the national economies of many countries of the world and the world economic system as a whole. After all, the hospitality and tourism sector provided about 330 million jobs (every 10th job worldwide) and 10.3% of global GDP (8.9 trillion US dollars) in 2019. Over the past five years, one in four of all new jobs worldwide, across all sectors and industries, have been generated by the travel and tourism industry. For example, in the G20 countries, this sector is responsible for 211.3 million jobs and \$ 6.7 billion of GDP. Tourism as a sector of the economy provides sustainable socio-economic development, increased employment, reduced poverty rates, social inequality in society, provides opportunities for free movement and provides equal opportunities regardless of age, gender, education. National and ethnic origin, personal convictions, because about 54% of the labor force involved in tourism are women, and more than 30% are young people.[1]

In fig. 1. determined the size of the tourism market worldwide from 2011 to 2021

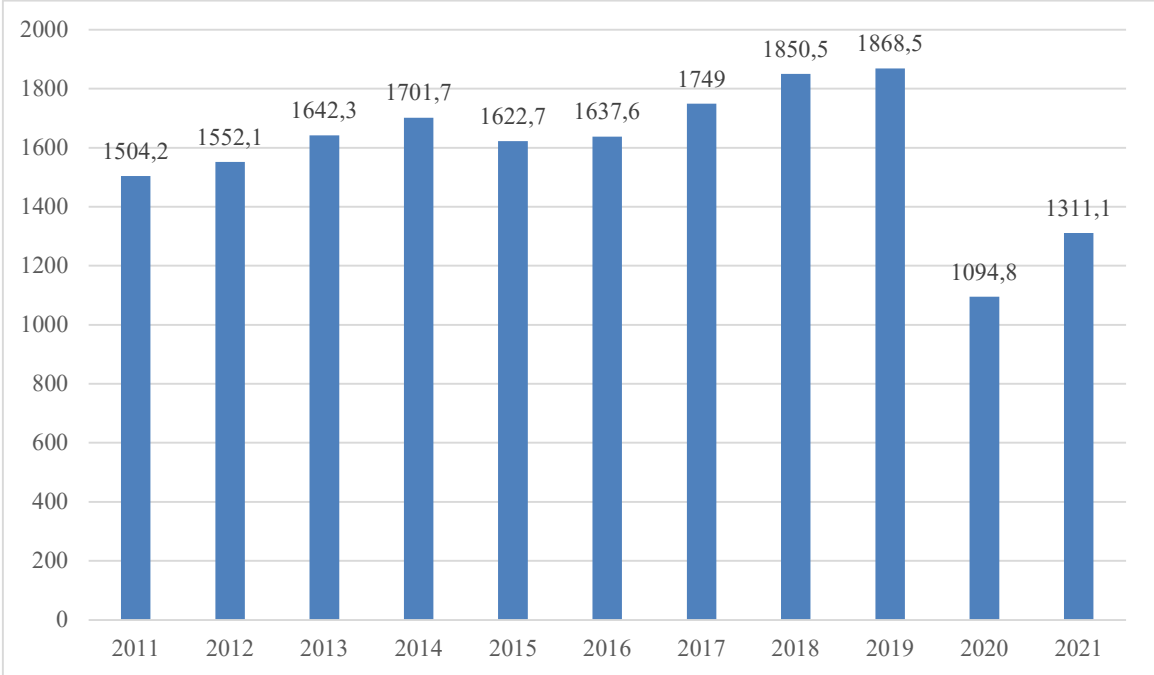


fig.1 - Market size of the tourism sector worldwide for 2011-2021, billion USD [2]

Unfortunately, during 2021, the hospitality and tourism industry is facing unprecedented challenges related to the COVID-19 pandemic. This sector is one of the hardest hit, and according to the latest WTTC estimates, by the end of 2021, more than 197 million jobs and \$ 5.5 trillion will be lost globally due to the global tourism crisis. As of November 2021, the virus pandemic has gripped and affected more than 121 million jobs and livelihoods in tourism, leading to an acute social and economic crisis. Accordingly, this had a significant impact and negative consequences on the development of tourism and the state of the economy in Ukraine.

The crisis will have serious consequences in the global economy, while according to the IMF report, the projected drop in GDP from April 2021 in Ukraine will reach 7.7%. There are quite different assessments regarding the further recovery of the global economy - from a V-shaped scenario, providing for a 2019-level economic recovery as early as 2021, to a longer recovery and even a long-term recession.

Due to the coronavirus pandemic, the global tourism industry may lose \$ 2.1 trillion in revenue by the end of 2021. Such research data was published by the World Travel and Tourism Council (WTTC). Coronavirus, movement restrictions and quarantine threatens 75

million jobs worldwide. Most of all - 48.7 million jobs - and in the Asia-Pacific region. 10 million jobs each could disappear in Europe and America

Studies show that the governments of most countries immediately responded to the need to minimize the economic impact of the COVID-19 pandemic, taking as a basis two general approaches to mastering the situation: the first approach is aimed at ensuring affordable credit lines for business, and the second - to defer the payment of debt and tax payments. obligations.

We propose to consider the main measures to support the tourism sector in the context of a pandemic, which were applied to both the tourism organizations themselves and, accordingly, to support tourists.

These are measures (from direct financial assistance to loan forgiveness), simplification of state aid rules, new guidelines for passenger rights and the application of travel directives, creation of programs and projects to support the industry, implementation of communication platforms, surveys, promotion of employment and training in tourism, etc.

For example, in support of tourists, countries such as Belgium, Bulgaria, Croatia have introduced a voucher system to compensate for the cancellation of an event / event as a result of the COVID-19 crisis. In Belgium, if the tour owner has not used the voucher within 2 years after it was issued, the tour owner may request a refund. In Bulgaria, there is a deadline for the return of funds from the tour operator (June 13) if the traveler does not accept the options provided (voucher or replacement of the tourist package). Croatia has established that for unfulfilled tourist carriage contracts that were to be executed after March 1, 2020, the passenger has the right to terminate the contract after 180 days from the date of the termination of the special circumstances. The travel organizer will issue a voucher for the unrealized trip. If the traveler chooses to refund the money, the organizer must make the refund within 14 days after 180 days from the end of the special circumstances. A voucher issued for an outstanding travel contract in a package arrangement is covered by an already agreed insolvency guarantee and must contain information about the guarantee.

In order to maintain employment, some countries have introduced the following measures and adopted directives, for example: Argentina, in an effort to maintain employment, invests in public works aimed at revitalizing the economy, which will be used for road works, housing and school work and tourism. Expanded Productivity Recovery Program (REPRO) to ensure the employment of workers in companies affected by this emergency. With this program, employees are offered a fixed amount in addition to their equivalent monthly salary for up to 12 months. Austria Introduced package activities for small and medium-sized enterprises (SMEs) in the tourism industry (managed by the Austrian Tourism Development Bank): Government guarantees for the restoration of loans used to cover temporary liquidity shortages caused by the decrease in turnover as a result of COVID-19. The existing volume of existing guarantees has been increased to 1 billion euros. Travel businesses that had active loans prior to the start of COVID-19 can apply to terminate all repaid loans for 2020. Azerbaijan has adopted special provisions on social security (national insurance) for tourism workers, including the self-employed. This includes food aid and unemployment benefits. Brazil provided a 25 percent pay subsidy to local workers in SMEs with 100 employees and below for three months. This subsidy is intended to help ease the burden on SMEs, especially for local workers who receive monthly wages of BND 1,500 and below. Bulgaria has amended the Labor Code to allow employers to force workers to take their paid leave during a state of emergency. If a company is terminated by government order, workers must be paid at least 50 percent of their net wages, but at least 75 percent of the minimum wage required by law. Malaysia has undertaken activities including: a monthly wage subsidy of USD 137-276 (RM1,200,000) for 3 months to encourage employee retention; financial assistance in the amount of USD 137 (RM600) monthly to employees forced to take unpaid leave of up

to 6 months; the allocation of US \$ 45 million (RM 100 million) to help businesses improve the skills of their employees; free online training of specialists for workers in the tourism sector. The Central Bank of Egypt (CBE) offers low-interest funds to tourism properties, especially to pay salaries to workers. The Ministry of Tourism and Antiquities has activated a hotline (19654) to receive complaints and inquiries from workers in the tourism sector. In China, local governments of all provinces, municipalities and autonomous regions have carried out various activities to support enterprises in the tourism sector in terms of financing, tax deduction, social security, employees, etc. To save jobs for tour guides, reserve the necessary human resources to restore tourism. The post highlights protecting the rights and benefits of tour guides, encouraging them to take free online courses and providing preferential policies for tour guides, including waiving the 2020 annual fee and extended certification renewal periods.

To assist tourism companies, the following activities have been undertaken: in Colombia, the Ministry of Commerce, Industry and Tourism (MINCIT) has launched a credit line for tourism, including airlines, up to \$ 62 million has been assigned. A communication channel was introduced to monitor the economic impact on the sector and respond to emergencies (Whatsapp Chat tourist event). In Cyprus, the support for the resumption of tourism includes an additional appropriation of € 11 million for the implementation of tourism support activities in Cyprus. until March 2021. In Turkey, the limit of the Loan Guarantee Fund will be increased from 25 billion TL to 50 billion TL, and it will be provided to small and medium-sized enterprises and companies with liquidity needs and collateral shortages. Travel agencies eligible to purchase discounted tickets will receive an additional 10% discount. In Poland, tour operators receive a refund of their own contributions to the Tourism Guarantee Fund for a package canceled due to the coronavirus epidemic; Accommodation services and travel and tour guide services will also be supported. a mechanism to minimize financial losses for entrepreneurs in order to ensure the proper functioning of economic operators in the tourist services market as part of the spread of the coronavirus. In Thailand, the Department of Tourism has developed a capacity development project for tourism entrepreneurs and personnel to improve service and build trust for tourists, a project to promote and modernize tour operators to Thai tourism standards, and a project to promote tourism accommodation in the community. The Hungarian government in enterprises operating in the affected sectors, employers are exempt from paying payroll tax for March, April, May and June 2020, with the exception of the health contribution, which cannot exceed 7,710 HUF. Chile Service de Capacitación y Empleo (SENCE) has launched a program offering over 40 free online courses in information technology, entrepreneurship and 21st century skills aimed at tourism entrepreneurs. The Japanese government is providing strong liquidity support totaling 1.6 trillion yen, including real interest-free loans, which will also be provided to private business owners.

Lending and rental of premises. Brazil National Development Bank (BNDES) opened a credit line that includes a 6-month interruption in loan payments, without delay in interest payments. Travel firms were provided with easier access to loans and deferred payments. Provide a 30% discount on government lease rentals for SMEs according to targeted sectors such as tourism, hospitality, air and water transport restaurants and cafes, to help reduce operating costs. In Georgia, banks are restructuring departments for all individuals, especially for companies operating in the tourism industry. Also, over the next three months, banks will stop paying customers on loans. For 6 months, the government pays interest on loans for hotels with 4 to 50 hotel rooms. Loan payments for firms facing cash flow disruptions due to coronavirus will be delayed by three months, and additional financial support will be provided if necessary, domestic air travel value added tax has been reduced to 1% from 18% in three months. France has authorized the issuance of travel loans to

customers: The order allows travel professionals to offer their customers a credit card valid for 18 months, instead of a refund corresponding to the total amount paid for an impossible trip or stay due to action taken in light of the coronavirus epidemic. [3]

Taking into account the above, we propose to consider the main conclusions and facts characterizing the state of the tourism and hospitality sector in Ukraine, formed in the results of the negative consequences of the global pandemic in 2020, and the main measures that are proposed to be applied to improve the situation.

Firstly, in Ukraine today there is a significant lag in the pace of implementation of measures to support the tourism sector, which poses a serious threat to the competitiveness of the industry in the global market during the projected recovery period in 2021.

Secondly, the share of tourism in the general economy of Ukraine is the topic of in-depth discussions and, according to official statistics, is about 3-4% of GDP, which is significantly lower than the international average (equal to 10%). Consequently, tourism is practically not taken into account in the formation of economic policy at the national level. However, the latest data from international structures (first of all, the UN World Tourism Organization, UNWTO) confirm their own calculations of internal experts, who determined this share at about 9% of Ukraine's GDP. This gives grounds to consider this indicator to be much more important for the Ukrainian economy than before.

Based on the estimates of the State Statistics Service of Ukraine, employment in the tourism sector is at least 700,000 - 900,000 jobs (2029), which is the result of the interaction of the accommodation and catering sector with such industries as art culture, entertainment and recreation of about half a million people ... And this is without taking into account the strong transport sector and other components of the tourism economy. The total economic contribution of tourism in 2019 is presented in Table 1.

Table 1

The total economic contribution (share in GDP) of tourism in Ukraine in 2020

Components of tourism	%
Розміщення	27,7
Transport	27,2
Culture	9,6
Sports	6,7
Recreation	6,4
Car rental	6,1
Catering	5,1
Other	11,2
Totall	100

Note that the tourism-related economy in Ukraine depends mainly on domestic tourism, as well as the internal component of outbound tourism. At the same time, the inbound flow from abroad forms a little more than a third of the entire economy of national tourism. For comparison: on average, the share of inbound tourism in the total amount of tourism spending in the EU is 90%.

The structure of tourist satellite accounts corresponds to the structure of those countries that have similar tourist products, but with a significant lower share of catering in the overall structure (according to international criteria, in most countries, the share of catering in the tourism economy is 10-15%). On the other hand, the transport and culture sector provides a

relatively higher level of contributions to the economy, when compared with similar indicators in other countries of the world.

Thirdly, in terms of the consequences of the COVID-19 pandemic in tourism, Ukraine is in a relatively better situation than most countries, since the share of domestic and outbound tourism here significantly exceeds the indicators of the incoming flow.

Fourth, tourism in Ukraine has not received a quick systemic response from the government through the implementation of possible measures to support the tourism industry when compared with the average response and types of measures introduced by the governments of neighboring countries and EU member states. This further complicates the situation of small and medium-sized businesses (MBB) operating in the field of hospitality, tourism and recreation. [4]

Nevertheless, to date, the Ukrainian government and the relevant state authorities at different levels of government have taken into account the need to implement immediate measures to respond to the COVID-19 crisis and maximize the tourism economy in Ukraine, which made it possible to identify a number of priority areas (Fig. 2).

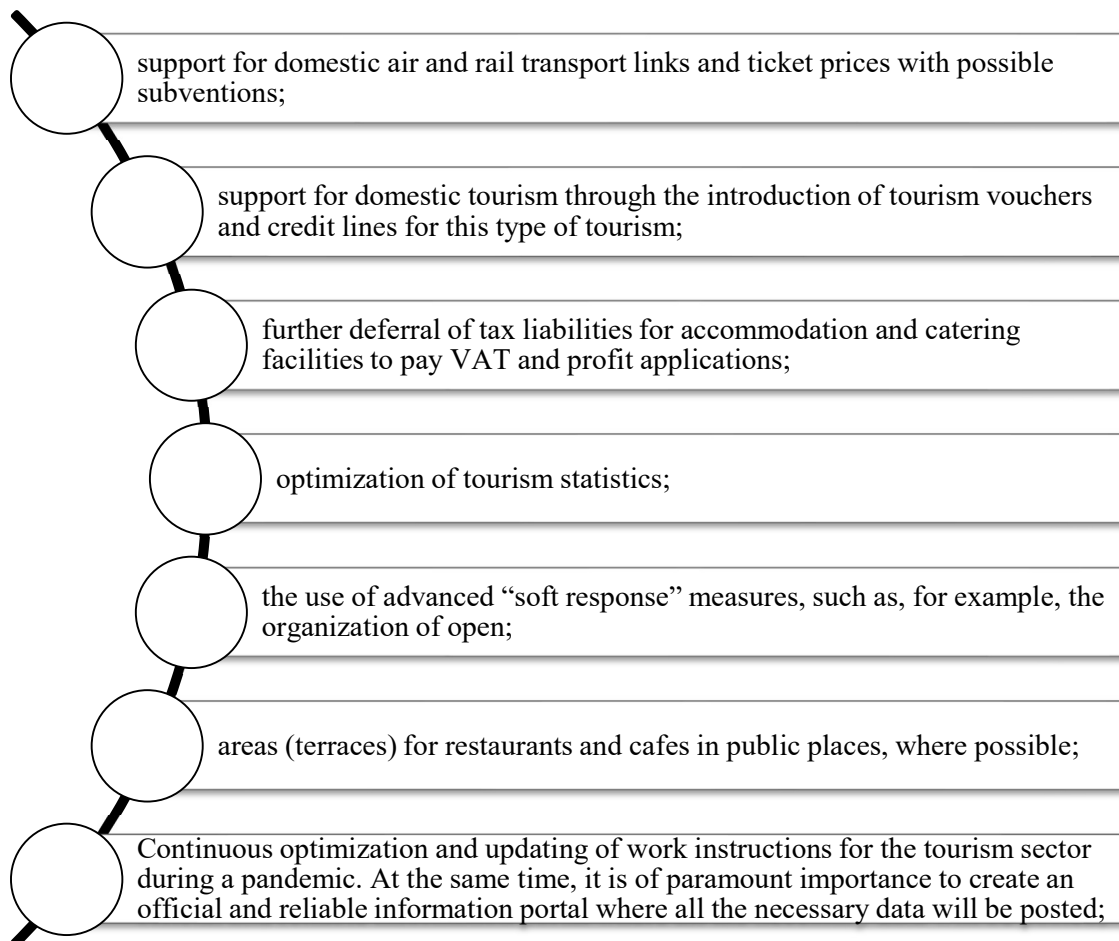


Fig. 2. Measures to respond to the COVID-19 crisis and maximize Ukraine's tourism economy [4]

In our opinion, the implementation in practice of measures to minimize the negative consequences caused by the pandemic will support entrepreneurs operating in the tourism sector, which will speed up the recovery from the crisis. So, for the example of the COVID-19 crisis, tourism in Ukraine was in a state of improvement after a significant decline associated with the events of 2014. In fig. 3 shows the main characteristics of the conditions for the development of tourism in Ukraine before the spread of the COVID-19 pandemic,

which allows us to conclude that the development and implementation of appropriate measures aimed at overcoming the crisis in tourism and hospitality, activating and supporting the development of domestic tourism in Ukraine will help to intensify its development.

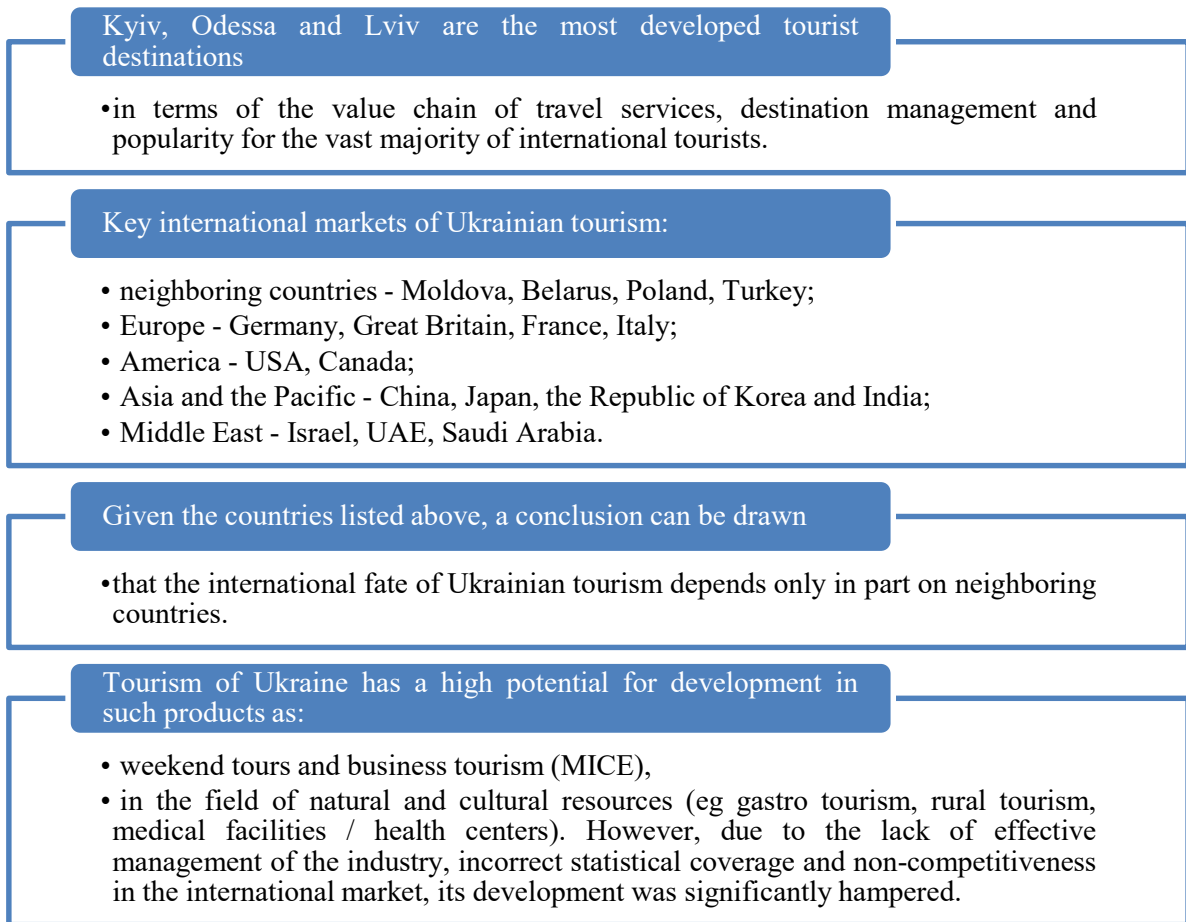


Fig. 3. The main initial conditions for the state of tourism in Ukraine before the pandemic COVID-19

It is worth noting that research conducted by the World Tourism Organization suggests that the global pandemic has led to changes in the reorientation of tastes of travelers, who began to prefer travel within the country and outdoor recreation. [7] Despite the dynamics of the spread of the COVID-19 virus in 2021, the tourism industry began to gradually revive - more than 54 million international tourists traveled around the world. This is the highest level recorded since the beginning of the health crisis, which led to the shutdown of the global tourism industry for many months. This figure also represents an increase of about 58% compared to 34 million international tourists in July 2020. However, it is still far from the 164 million travelers in 2019, a record year for tourism. According to the UNWTO, this relatively positive result is due to several factors, including the recovery of many destinations for international tourists, such as the United States, Mauritius and New Zealand, and, of course, large-scale vaccination campaigns around the world. Among other things, the deployment of vaccines makes it possible to gradually restore safe conditions for movement in Europe and other parts of the world.

However, 2021 remains a difficult period for tourism, as “international arrivals are 80% less than in 2019. During this year, the number of travelers in many areas decreased sharply compared to 2019 (Fig. 4).

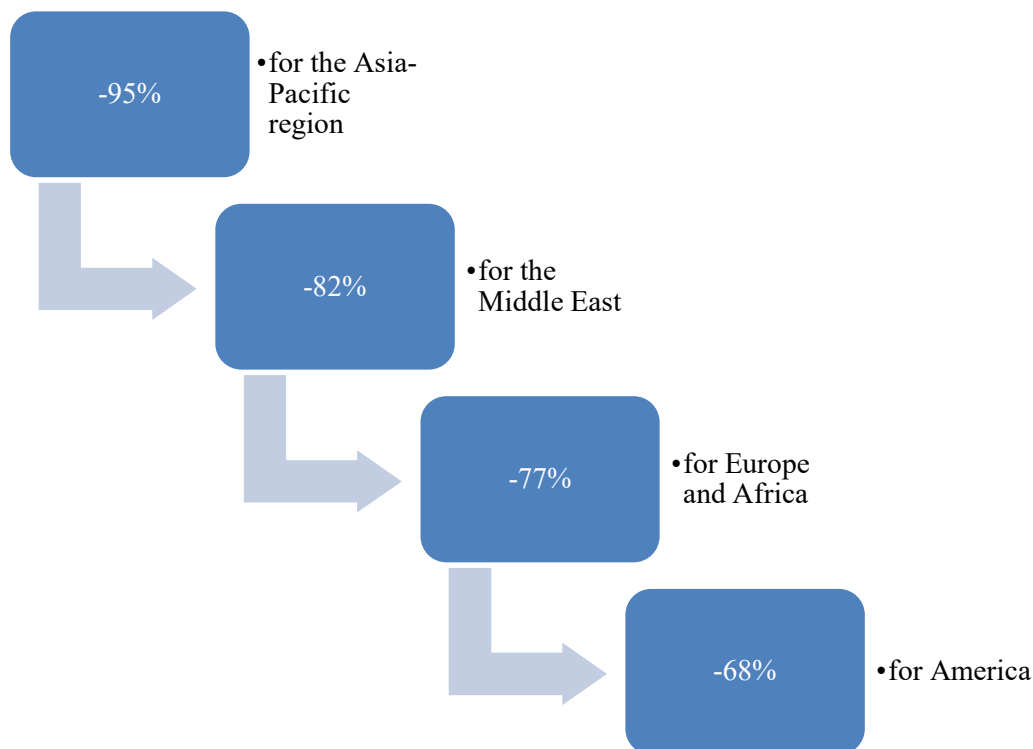


Fig. 4. The dynamics of reducing the number of travelers in 2021

While small islands in the Caribbean, Africa or the Asia-Pacific region, as well as small European destinations during the same period saw arrivals close to or even higher than the level caused by the global pandemic. Major tourist destinations are still trying to return to the level of Covid, such as Spain, which before the crisis was the second largest tourist destination in the world with more than 83 million tourists in 2019. This year, the goal set by the government was to get 45 million tourists, a little more than half of 2019 figures. But in the first 8 months of the year the country received only 15 million tourists, which is 4.2% less than in the same period last year, so to reach the goal of 45 million passengers seems difficult. [3]

Taking into account the research and the analyzed measures implemented by the governments of many countries to restore tourism and increase the number of travelers, we can identify the main trends and values of travel that will shape the industry in 2022.

1. TRAVEL WITH TECHNICAL CAPABILITIES WILL BE VERY IMPORTANT.

It should not be underestimated that the role of technology in travel will continue to grow in 2022 and beyond. From digital vaccine passports to real-time travel notifications, technology solutions will play a key role in informing the public and providing guidance on all travel decisions. As countries begin to receive newly vaccinated travelers, testing, quarantine and form requirements will still vary from destination to destination. Ensuring clear and current requirements for international travel - as well as timely updates in the event of changes in travel conditions - will be important to support travelers on their journey. In addition, contactless technology will continue to simplify travel. Travel companies have taken advantage of innovative technological solutions to ensure the safety of travelers and provide instant access to assistance and information. Contactless registration and boarding, the ability to order food or services through the app or concierge support via Whatsapp or chat - all these solutions provide additional peace of mind for the traveler. It is also expected that the importance of AR / VR technologies will increase due to such solutions as virtual tours

of resort apartments, aircraft salons, museums and attractions. These technologies help travelers to explore their destination more carefully, providing confidence in travel planning.

2. PERSONALIZATION AND GUIDANCE ARE MORE IMPORTANT THAN EVER.

In addition to travel requirements, travelers will prefer expert advice on every aspect of their trip. While in previous years, trip planning could be done through review sites or easy web browsing, there is now much more to consider. For example, how has the spread of vaccines progressed in this direction? Are there mandates for restaurants or theaters? For many travelers, creating daily itineraries is now a much more complex and difficult process. Travel companies can meet this need. From health protocols for each attraction to ideas about where and when to avoid crowds, travelers will pay extra attention to planning their trip - and expect personal support from the brands they travel with. For a travel company, this can look like rethinking tourism marketing and digital strategies, integrating hyperlocal destination content into programs, social networks and websites, and providing authoritative information to protect travelers and their loved ones. Companies are no longer just a link from point A to point B, but a source of wisdom and support along the way.

3. DESIRABLE PLANS AND EXPERIENCE IN 2022

As travelers think about traveling in 2022, enriching their travel experiences is paramount. Many travelers seek to restore communication with loved ones, and outdoor recreation provides both recreation and social distance. Travelers will look for hidden gems, dreams and opportunities for outdoor activities such as hiking, photography or kayaking. And when it comes to housing, cleanliness and security are a must. A recent study by the European Tourism Commission shows that more than half of respondents who plan to travel next year prefer to stay in hotels or independent resorts rather than short-term rent and other accommodation. The strength of a trusted brand gives you confidence that the right health measures will be taken. Combined with untouched nature, these elements add an extra layer of support to the traveler's journey. With this in mind, the resorts can attract 2,022 travelers, providing cleaning protocols, wellness programs and environmental tours. In addition, hotel brands located outside the resort - such as holiday homes or cottages - may have rooms that provide extra space and privacy, as well as professional cleaning and customer support that you can expect from their favorite resort brand.

4. SUSTAINABILITY, CONTINUOUS TRAVEL TREND IN 2022 AND IN THE FUTURE

Sustainability, especially in the aviation industry, is and will be a constant trend in travel. Tourism trends around low-carbon travel, which we will discuss below, will continue to evolve as travelers closely follow the organizations' environmental initiatives. For example, Google Flights now provides carbon emissions estimates for most flight queries, an important step for the industry in providing travelers with environmental information. The tourism community will also increasingly expect transparency from tourism organizations in their sustainable development initiatives. As international travelers become more aware of the climate crisis, there are growing concerns about reducing their footprints and responsible holiday enjoyment. ETC recently published its handbook on promoting sustainable tourism. Here are some ideas that reflect the values of travelers:

almost 70% of travelers expect the industry to offer cleaner travel options;

46% of European travelers consider waste management to be the most important environmental issue;

40% of European consumers will stop flying to help mitigate climate change.

As countries around the world work to meet their Paris Agreement commitments and individual companies present their own environmental goals, travelers will look for organizations focused on sustainability and innovation. From plastic-free initiatives to progress in reducing carbon emissions, travel brands need to communicate with their travelers on all of these issues.

5. SAFETY AND HEALTH-ORIENTED MEASURES

Along with the priority of health and well-being and the desire to connect with nature, travelers seek to invest in brands that share these beliefs. For example, a recent study by the OAG found that 70% of U.S. travelers surveyed believe that vaccine passports should be mandatory for international travel, and 68% are also interested in domestic passports. Research continues to show that travelers feel safer when it comes to health, retail and tourist destinations, so this will remain a trend in 2022. Travel companies should not only emphasize their own security initiatives, but also local attractions that do more for the health of the population. This content not only informs the audience of travelers, but also inspires and fascinates.

6. TRAVEL "BACK TO BUSINESS".

Finally, take a look at corporate travel trends. It is an industry that remains in the air and is likely to be one of the last sectors to recover internationally. Returning to business travel will depend on many factors, including the level of vaccination, the opening of borders and a revised budget structure. Because many organizations have found remote work to be effective, large corporate travel may not be as high a priority as it was in the years before the pandemic. Therefore, we can expect more online trainings and webinars, virtual or hybrid conferences, as well as a focus on regional travel when events begin to resume. In the meantime, however, it is important to pay attention to the mood around business travel. In addition to clear and thorough notices of travel requirements and cleaning protocols, travel companies should approach corporate clients with understanding and support. Proposals such as flexible cancellations, spacious and private business-class armchairs and hotel remote work packages can help solve customer concerns and concerns. [8]

Thus, in the end, we can say that the crisis that has arisen in the field of tourism as a result of the pandemic will have a significant and lasting impact in many countries around the world, including Ukraine. In our opinion, the manifestations of the crisis in the future will be accompanied by a decrease in purchasing power, which will lead to such consequences as: increased competition between tourism service providers around the world in the coming period; a more thorough and lengthy process of booking and decision-making by travelers when choosing a destination, which, in turn, increases the role of online information availability and presentation. Note that ensuring the restoration and development of tourism in Ukraine largely depends on overall economic development. Therefore, the priority should be to maintain domestic tourism and incoming passenger traffic at the same level, redirecting most of the outgoing traffic to destinations within Ukraine. Following the end of the COVID-19 pandemic crisis, efforts are being made to strengthen Ukraine's international tourism demand. Awareness-raising measures can be quite effective due to global changes in tourism products, consumer needs and the overall tourism model. Digital transformation and online presence will undoubtedly be very important factors, not only because of the need to provide information to consumers and marketing, but also in terms of organization and work of various professionals in the field of tourism. It can be assumed that the vast majority of improvements in the organization of tourism will be based on the organization of virtual solutions and remote work, as well as on educational programs, which in many countries will remain online after the COVID-19 crisis. Optimizing the supply chain in tourism and,

in particular, improved methods of using natural resources and cultural heritage sites will become even more important, as global tourism is projected to reach its 2019 level of development in 3-5 years at best. Thus, given a number of relevant and effective measures to improve tourism, a gradual recovery in world tourism is expected in 2022, but the tourism sector will not return to pre-crisis levels by 2023 or 2024, as although recovery is visible, it is gradual.

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